Business Gateway

Advisory Group Meeting

MARCH 23, 2005

Meeting Facilitator:
- Justin Van Epps   SBA

Knowledge Agent:
- Jiyoung Chung   PMO

Participants:
Lisa Westerback for Karen Hogan, DOC
James Hyler, DoEd
Bill Burdett, DOJ
Steven Lott, DOT
Constance Downs, EPA
Keith Thurston, GSA
Jack Stoute, HHS
Carole Campbell, SSA
Jerry Williams, SBA
Joel Dean, HUD
Leslie Nanney, USDA
Barbara LaCour, USDA
Tim Foreman, DOD
Frank Ramos, DOD
Bruce Borzino, GSA
Kate Donohue, DOL
Cameron Hogan, PMO
Mardel Hall, PMO
Adjoa Cathcart, PMO

Dial-in Participants:
Toby Henderson, DOE
Tim Wang, OMB
Shivani Desai, OMB

Meeting Location and Time:
GSA Room 1108, 1:00 – 3:00 PM

Meeting Purpose:
- Provide a brief status update on the project
- Facilitate a working session that will help us solicit your ideas and insight on how to continue to move the project forward

Meeting Outcomes:
- Understanding of recent accomplishments, planned activities, risks and mitigation strategies
- Overview of project financials
- Feedback on the future direction of Business Gateway

Meeting Agenda:
- Introduction and set the stage for discussions
- Project Overview and Discussion
    - Research & Outreach
    - Portal/Content Management
    - Compliance Assistance
    - Data Harmonization
    - Forms Catalog & Forms Processing
- Overview of Project Financials/Resource Issues

- Project Feedback
- Next Steps

Meeting Summary:
In addition to providing an update on current project milestones, the PMO also addressed questions regarding background information and clarified other issues.

Research
PMO will soon be launching a multi-phased research effort to clearly define needs of the business community and how Business Gateway can meet those needs. Currently, PMO has conducted vendor meetings and is undergoing the procurement process for all research phases, described below:
- Phase I (April- May 2005): Focus groups, industry association roundtable, and secondary research (including agency data)
- Phase II (June-July 2005): Survey
- Phase III (FY06): Post-enhancement usability testing and external web analysis

PMO has secured a focus group vendor and will conduct a focus group kick-off meeting on April 4th during which project lane leads will meet with the research vendor to clarify/ specify research needs. The other research phases/ components will be put to bid within the next couple weeks.

Resource Needs: PMO asks that agencies send FAQs and other inquiry logs/ reports they may have that highlight business constituents' most pressing government information needs. *Action:* Please send this information to Jiyoung Chung at Jiyoung.chung@touchstone.com.

Outreach
Business Gateway is preparing to exhibit a booth at the SBA Expo trade show on April 26, 2005. In addition, PMO is working with its Office of Communications and Public Liaison to procure a vendor to develop a strategic outreach plan. PMO will identify existing contract vehicles and put the outreach SOW to bid (Q3).

Resource Needs: PMO asks that partner agencies provide information regarding existing outreach channels and a list of Public Affairs contacts. *Action:* Please send this information to Jiyoung Chung at Jiyoung.chung@touchstone.com.

Content Management
To date, content has been managed and updated primarily by the PMO, but moving forward, PMO must share this responsibility with partner agencies if Business Gateway content is to remain current.

PMO presented an overview of the Content Management governance structure (see page 9 of the meeting presentation deck) and outlined Content Management resource needs. Moving forward, the PMO will obtain approval for the Content Management Process from the Advisory Group and Governance Board and implement the Content Management Process once the Governance Board has approved it; align/integrate business.gov with related sites; train agencies on the current CMS; define business, functional, and technical requirements; and document a CMS acquisition strategy.

Resource Needs: PMO will communicate with the Working Group level the week of April 11th regarding the Content Management Process document and seek approval from the Advisory Group meeting. *Action:* Please review the Content Management Process document; an overview will also be presented at the April 13th Advisory Group meeting, at which time PMO would like approval to move forward with the process.

Following the presentation, PMO fielded questions:

<u>Q&A</u>
Policy Board v. Governance Board
Q: Is the Content Management Policy Board separate from the overall project Governance Board?
A: Yes, they are separate entities, but there may be overlaps in representation. The vision for the Policy Board is to set strategic direction specifically for the content on and structure of the site.

Working Group members
Q: Where do Working Group members fall into this structure?
A: In the Agency Review Panel and Agency Coordinator roles; some Working Group members may wear a second hat for these roles. PMO delineated these as two separate roles because PMO did not want to assume that those involved with project planning in the Working Group woul necessarily be those working to manage the site on an operational level. Some Working Group members are not necessarily have technical expertise, which would be required for the Agency Coordinator role, so agencies may need to provide additional resources in some cases.

Unfair agency burden
Q: Has the PMO considered that this governance structure may place too great a burden on agencies? Will the PMO create standards, i.e., tag items "P" for permanent, so links won't need to be vigilantly monitored for expiration dates/ updating needs? AG also suggested that agencies provide links to their websites, which should be the extent of their responsibility.
A: PMO clarified that this is the governance structure for business.gov, not forms.gov, and that Business Gateway also houses much more content beyond forms, such as Compliance Assistance tools, and is intended to be more dynamic and organic in its content functionality and growth. In addition, it is important to involve the agencies in the content management process because SMEs reside at the agency; in order for Business Gateway content to be relevant, SMEs must be involved in selecting the content and providing the context around it.

Tiered responsibility based on number of website hits
Q: Has the PMO looked at agency responsibility based on hits per agency? IRS's number of hits is probably very high; DOD's may be low (except for year-end procurement).
A: PMO analyzes web trends and will do so increasingly in the near future, but will also use other sources of information, as the number of hits may not be the right metric to determine what content users use most frequently or derive most value from. PMO will conduct focus groups and use other information sources, as well.

States as best practice examples
Q: Large state governments are entities that look most like the federal government. Has BG looked at state portals? Virginia would be a good example, as it was the first state to stand up a portal.
A: BG has not met with the state of Virginia yet, but it has investigated how other countries have tackled the issue (Canada, England). New York is also a great example of a transactional portal. PMO will continue to look to these best practice entities and others for lessons learned.

Resources from more agencies rather than more resources from the same agencies
Q: AG asserted that it seems like the governance structure outlined in the Content Management Process is already largely in place. The real issue is that some agencies are already very involved, participating with 100+% effort, and others are not participating. PMO's focus should be on involving other agencies that have had limited participation to date.
A: PMO thanked agencies for their participation and support, and clarified that yes, agency participation at all levels, including at Working Group levels, has ensured success thus far and that it will seek increased participation from agencies that have not participated as much to date. PMO clarified, however, that moving forward, the Content Management resource needs will be more concrete and specific, as content will be updated on a more frequent basis. This Content

Management Process document and governance structure aims to institutionalize a process to make content updates as automatic and burden the agencies as little as possible.

Create content standards
Q: It would make it easier to maintain/ manage content if there were guidelines on what kind of information should be included on business.gov, i.e., scope of information, level of detail, etc. Perhaps the Content Management governance group should define these standards.
A: PMO will do this.

Agency Coordinator role clarification
Q: If a portal is a gateway to existing sites, it should have good search engines (to allow for data mining) and be transparent to the information agencies already have. Agency Coordinators should perhaps therefore be familiar with agency web content and management.
A: Yes, web managers seems like the right group to liaise with the Content Manager as Agency Coordinators because they are already aware of agency programs, changes, etc., to be able to communicate what information needs to changed on business.gov on an ongoing basis. PMO conducted a half-day Content Management Working Group session, many participants of which were content managers of their agencies.

Q: The Content Management Working Group member may not necessarily be the right person to help define functional requirements. Agencies seem to agree that the appropriate individual for the Agency Coordinator position should be technical.
A: Yes, the PMO agrees and will be sure to clarify what type of person/ skills are needed moving forward for different Working Group sessions so agencies can identify the appropriate individual.

Feedback on content layout
Q: EPA has penned a paper outlining its perspective on the site's layout. One main point is that it needs to be easier to find the Forms link on the site. It took people more than 3 minutes to find the link. EPA hopes that the site structure will be updated.
A: This kind of feedback is welcome, and we will be using such agency feedback, in addition to feedback from the business community, to inform site updates.

Importance of a federated approach and clear roles/ responsibilities between SBA and partner agencies
Q: The success of Business Gateway hinges on a good federated approach (balancing responsibility between SBA and other agencies). Doubt was expressed regarding whether the PMO has answered some of the fundamental questions on how content will be shared, and who will own what content management responsibility.
A: PMO urges partner agencies to read the Content Management Process document, where responsibilities have been delineated between SBA/ PMO and the partner agencies.

Define a strategic vision
Q: What is the overall, strategic vision of what information the site will present, and of how Business Gateway will approach content management? That's what's missing from this overview.
A: PMO will try to articulate the business.gov vision more clearly moving forward. In addition, the market research will help inform this vision to ensure it is customer-centric.

Compliance
PMO has recruited new lane co-leads—Tracy Back of EPA and Kate Donohue of DOL/OSHA—to help guide the development of an overall Compliance Assistance strategy. PMO is also finalizing an SOW for a requirements analysis and is holding vendor meetings.

The Compliance Assistance team will provide input into the focus group development (early April) and review existing compliance tools and proof-of-concepts (Q3).

Resource Needs: PMO asks that partner agencies identify individuals to participate in the Compliance Assistance Working Group. *Action:* Please think about who would be the appropriate individual for this role; once PMO has scheduled firm meeting dates, please endorse this individual's participation.

Data Harmonization
BG is bringing in a contractor to facilitate partner agency discussion around development of a data harmonization strategy and implementation of data harmonization initiatives. A member of the OMB FEA team will also help develop the data harmonization strategy. The Coal Vertical data harmonization project is ready to implement and is awaiting contract award in early April.

Data Harmonization strategy planning sessions will be conducted in April (exact dates TBD).

Resource Needs: PMO would like partner agencies to designate an individual to participate in upcoming Data Harmonization strategy planning sessions and help identify a lane lead detailee. *Action:* Please think about who would be the appropriate individual to attend strategy planning sessions; once PMO has scheduled firm meeting dates, please endorse this individual's participation. A position description will also be distributed for a Data Harmonization detailee. Please review this and send recommendations to Justin Van Epps.

Q&A
Government lane lead
Q: Is Business Gateway including FEA representatives in the Data Harmonization planning discussions?
A: Yes, BG is working with the OMB lead on FEA to coordinate this.

Q: Would the detailee be involved in the Coal Mining vertical?
A: No, the role would not involve the Coal Mining project. Stephanie Varvell, DOI, is already heading that up. The new role would be separate and apart from Coal Mining.

Q: AG suggested that the PMO write a position description so agencies can better identify who within their talent pool would be a good fit for the role.
A: PMO will write and distribute a role description.

Forms Catalog
Visits to Forms.gov increased over 200% of its previous daily average. The forms team also drafted and circulated Version 3 requirements to the Working Group for feedback. This project area's current focus is on maintenance (i.e., testing methods for broken links identification, coordinating with agency administrators to review their Forms.gov links). The Forms team clarified that it is tying the Forms Catalog process into OMB's ICR process so as not to duplicate efforts.

The Forms team will work to implement Version 3 goals, which include: easier-to-use reports, agency forms management enhancements, broken links reports, and enhanced search capabilities.

Q&A
Success metrics
Q: What is the universe of forms? What does the current number of forms mean? What metric does BG use to measure the success of forms.gov? Is the number of forms the right metric? Metrics/ success measures should be discussed among the Advisory Group before taken to the Governance Board. There needs to be resolution of this question, which has been lingering for weeks.
A: The original declared universe of forms was estimated between 4,000 and 4,400. The PMO believes that, with the efforts of the E-Forms Team, the universe of forms could approach 5,000. The number of federal government forms changes every day, and some agency numbers are

based on crosswalks. BG measures success primarily of the quality and amount of forms, not necessarily the number of agencies participating since the original mandate was 43 agencies which was established by a look at the RMS application and Information Collection Requests. Currently, there have been 59 agencies approached and 43 agencies have been actively populating the E-Forms Catalog. There is no authoritative source of how many forms exist in the federal government, so the forms team works with individual agencies to identify public-facing forms.

Q: AG cautions against the number of hits as an accurate success metric, because users may save links directly rather than going back to forms.gov.
A: This is very true, which is why PMO is conducting focus groups, quantitative data gathering, and usability testing to ensure accurate success measurement to better understand and quantify the value of forms.gov. Also, Hits is not a good indicator of Web application activity while Visits and Page Views can give a better indication of activity.

Ownership of forms maintenance
Q: Who is responsible for maintaining the forms? SBA or each individual agency?
A: The forms catalog places all citizens-facing forms in one site, but each form is actually located on each agency site; forms.gov links point to the forms housed on the agency sites. Forms are fillable/ filable only if the agency has made them transactional. Each agency is responsible for their content but the Forms Team is always available for support.

Purpose/ impact of forms.gov
Q: Long-term government users have already locked into where to go for forms and know exactly where to go.
A: That is true, but since forms are constantly changing and being updated, they may not be as easy to locate, and link names may change. In addition, the goal of BG is not to re-direct people that already easily navigate the world of forms to forms.gov; the hope is to simplify forms access and reduce the burden on business. The E-Forms Catalog does not replace any agency Forms Web site but serves as an alternative location for the public to retrieve forms.

Web traffic volume concerns
Q: Whatever agency is hosting forms.gov needs to anticipate spikes in usage.
A: The server can handle 600 concurrent users per second.

Forms Processing
LMI is finalizing and will present its analysis of alternatives (AoA) at the Advisory Group meeting in April. PMO clarified that LMI AoA is a starting off point and that it will need feedback from partner agencies to develop an implementation strategy. Also in April, PMO will conduct a series of strategy planning discussions with partner agencies to clearly define and articulate BG's approach for forms processing (exact dates TBD). The objective of these discussions will be to achieve consensus on a defined approach and to obtain approval by the BG Governance Board of the approach by the end of FY05. The ultimate goal is to implement a solution in FY06.

Resource Needs: PMO asks that partner agencies designate an individual to participate in upcoming Forms Processing strategy planning sessions (date TBD). *Action:* Please think about who would be the appropriate individual for this role; once PMO has scheduled firm meeting dates, please endorse this individual's participation.

Dashboards
PMO provided AG members with a copy of its weekly dashboards that track project milestones, MOUs, EVM, spending, and resources. PMO then addressed questions:

Q&A
Q: Obligations need to be tracked not only for the overall project, but per project lane, as well.

A: Yes, PMO does track that. These dashboards are just a top-level report; PMO tracks the project on a lower level of detail and would be happy to provide that detail upon request.

Project Direction:
PMO will be conducting strategy sessions to refine Business Gateway's vision. In addition, the Advisory Group will meet on April 13th (at SBA, Eisenhower Conference Room, 1:00-3:00pm).

Action Items/Next Steps:

Action Item List			
#	Key Tasks	Owner	Time-frame
1	Consult with the state of VA and other state and country governments to discuss lessons learned while standing up their portals	PMO	3 weeks
2	Provide most recent budget allocation sheet to agencies that don't have it	PMO	1 week
3	Provide position description for Data Harmonization government detailee	PMO	1 week
4	Identify appropriate individuals for Agency Coordinator, Writer, and SME roles for the Content Management governance structure	Partner agencies	2 weeks